

CARRIER CONTRACTING CHECK LIST

Print this document and follow instructions below:

After your Carrier Contracting Profile has been submitted and approved, you will receive emails from SureLC/Surancebay for each insurance carrier. You must open each email and confirm your contracting information for each carrier.
Some carriers may use a different “Contracting System” other than SureLC/Surancebay.

As you complete each request, write in the date completed in the table below in the column

“Date Surancebay Emails Completed” and then **take a photo and text to your manager.**

We only need this “Date” column completed before texting to your manager.

Carrier Name	Date Surancebay/Contracting Emails Completed by Agent	Have you been previously contracted with this Carrier?	Writing #	Pre-Appointment	Notes/Comments
AIG – American General American International Group			No		Requires E & O to be contracted Pre-Appointment Request by Mgr
Americo			Yes		Requires E & O to be contracted
Columbian Financial Group (CFG)			No		
Foresters Financial			Yes		
GPM – Government Personnel Mutual	See Notes		Yes		GPM does not use Surancebay. You will receive an email directly from GPM’s contracting system.
Great Western / Wellabe			Yes		
Mutual of Omaha / United of Omaha			Yes		
Transamerica			No		
Royal Neighbors			No		
Other:					
Other:					
Other:					
Other:					
Other:					

* Please indicate above if you have been previously CONTRACTED with any of our carriers.

**Review Pre-Appointment with your manager

***Writing Numbers: You will receive writing numbers from the carriers with a “YES” before submitting your first application.

Agent Name: _____ Date: _____ Equis Agent #: EF_____

Did you have your Life Insurance License prior to joining Equis: YES or NO

Resident State: _____

_____ Yes, I have E&O Insurance

_____ No, I do not have E&O Insurance